



Software Help Sheet 6: Building a Home Delivered Meal Route in SAMS

Author:	Alan Perry
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What is a Route?

Routes are lists of consumers that users can arrange in any order. Routes are most commonly used to organize and record driving routes for Home Delivered Meals.

SAMS creates lists of consumers for *Routes* using route filters. You can also manually add consumers to routes. Change the order of consumers on the list by using special toolbar icons. SAMS offers several printing options, including *Daily* and *Weekly* route printouts

SAMS also includes a route printout that includes meal delivery information, and a consumer suspension system that may be used to suspend consumer service deliveries, and routes.

Using Routes in SAMS is a four step process:

- 1) **Creating a *Route Definition***
- 2) **Refreshing the Route**
- 3) **Moving, Adding and Removing Consumers**
- 4) **Printing the Route**

Creating Routes

Step One: Creating a Route Definition

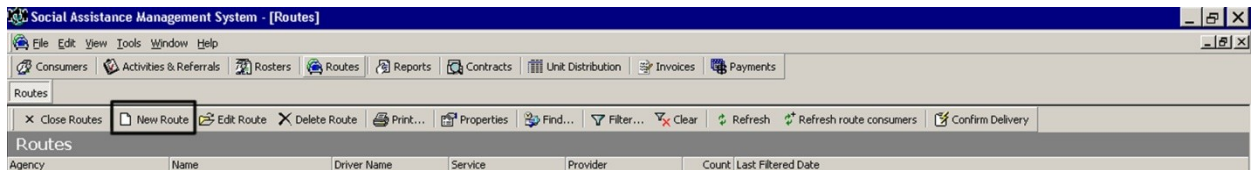
This step involves telling SAMS who should appear on the Route.

Hint: Once a Route definition has been built, you may use it over and over again. Simply refresh or add new Consumers.

1. In SAMS, Press the **Routes** button.



2. Once into the Routes area, press the **New Route** button.



3. The New Route screen looks like the screen below. As mentioned before, this screen is where you define *who should appear on the Route*. This screen is commonly called the Route Filter screen. *Hint: Use as few Filters as possible to build your Routes.*

Untitled - Route	
Route	
Name	
Driver Name	
Van No.	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	
Service	
Place of Service	
Subservice	
General Filters	
Town of Residence	(All)
ZIP Code	(All)
County	(All)
Municipality	(All)
Default Agency	(All)
Default Provider	(All)
Consumer Provider	(All)
Consumer Fund Identifier	(All)
Include Inactive Consumers	No
Service Filters	
Based On	(Any)
Care Program	(All)
Service	(All)
Subservice	(All)
Provider	(All)
Subprovider	(All)
Fund Identifier	(All)
Site	(All)
Status	(All)
Start Date	
End Date	

The Route screen below shows (in yellow) the fields that must be filled in the first time that you use your Routes. The next few pages have a detailed explanation of each of the fields involved.

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Route	
Name	
Driver Name	
Van No.	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	
Service	
Place of Service	
Subservice	
General Filters	
Town of Residence	(All)
ZIP Code	(All)
County	(All)
Municipality	(All)
Default Agency	(All)
Default Provider	(All)
Consumer Provider	(All)
Consumer Fund Identifier	(All)
Include Inactive Consumers	No
Service Filters	
Based On	(Any)
Care Program	(All)
Service	(All)
Subservice	(All)
Provider	(All)
Subprovider	(All)
Fund Identifier	(All)
Site	(All)
Status	(All)
Start Date	
End Date	

1. The Name Field

The Name field is simply used for naming your Route so that you may find it on the list later. We recommend that you put your Provider name in front of every Route definition.

Name	Fill in the Route Name Here
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2. The Agency Field

The Agency field should always be filled in with *Los Angeles County AAA*, as shown below.

Agency	Los Angeles County AAA
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3. The Provider Field

The Provider field should show your Provider name. Choose your Provider name from the dropdown list.

Untitled - Route	
Route	
Name	
Driver Name	
Van No.	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	Alzheimer's Association
Service	Antelope Valley Committee on Aging
Place of Service	Armenian Relief Society of Western USA Inc.

4. The Service Field

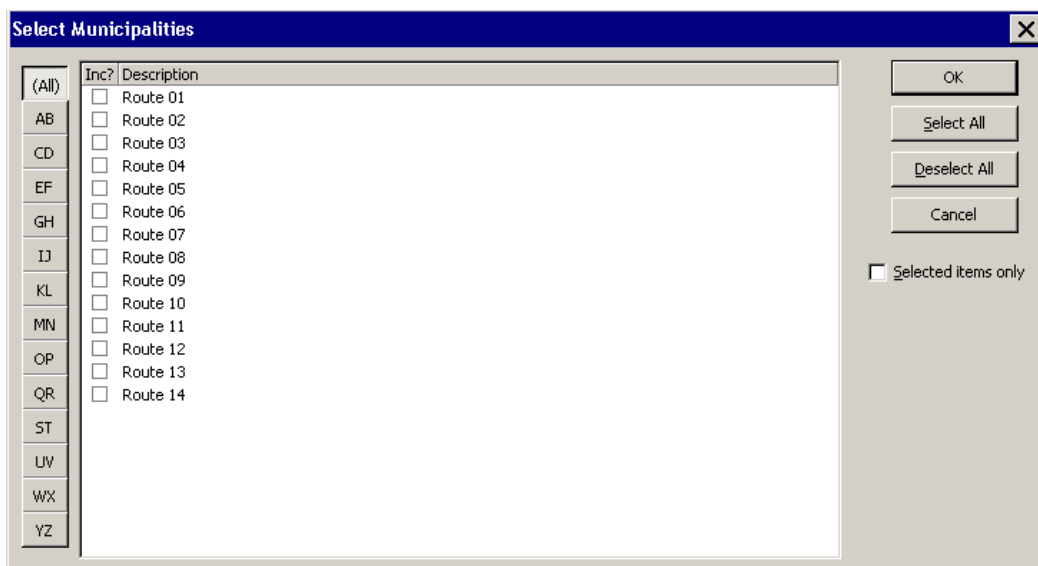
Each Route must have a Service. You will choose one Home Delivered Meal Service in this field, even if you are delivering more than one meal type on this Route.

Service	
	III-C1 American Style
	III-C1 Chinese Style
	III-C2 Frozen
	III-C2 Hot Meals

5. The Municipality Field

Every Consumer that you expect to appear on the Route should have a Municipality defined in their Consumer record.

The Municipality designation is in the *Residential Address* section of the Consumer record. The Municipality equals the Route number you expect the Consumer to appear on. Choose the Municipality / Route Number on this screen.



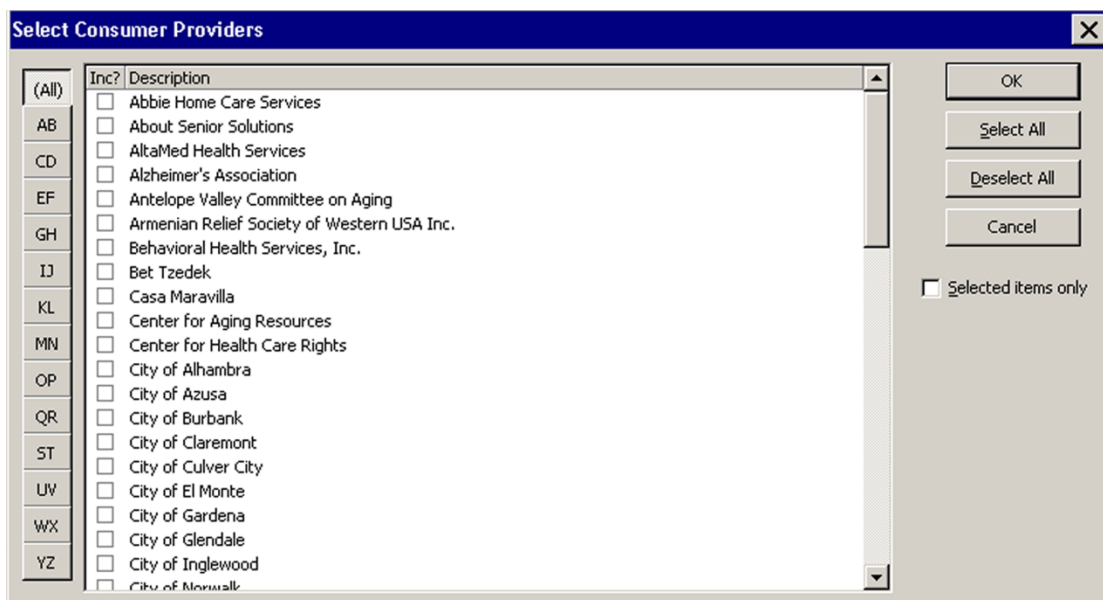
The "Select Municipalities" dialog box features a vertical list of route numbers from 01 to 14 on the left, each preceded by a checkbox. The list is organized under a header "Inc?" and a "Description" column. To the right of the list are four buttons: "OK", "Select All", "Deselect All", and "Cancel". Below these buttons is a checkbox labeled "Selected items only".

Inc?	Description
<input type="checkbox"/>	Route 01
<input type="checkbox"/>	Route 02
<input type="checkbox"/>	Route 03
<input type="checkbox"/>	Route 04
<input type="checkbox"/>	Route 05
<input type="checkbox"/>	Route 06
<input type="checkbox"/>	Route 07
<input type="checkbox"/>	Route 08
<input type="checkbox"/>	Route 09
<input type="checkbox"/>	Route 10
<input type="checkbox"/>	Route 11
<input type="checkbox"/>	Route 12
<input type="checkbox"/>	Route 13
<input type="checkbox"/>	Route 14

6. The Consumer Provider Field

Every Consumer that you expect to appear on the Route should have a Provider defined in their Consumer record.

The *Consumer Provider* field should show your Provider name. Choose your Provider name from the list.



The "Select Consumer Providers" dialog box displays a list of various organizations and services on the left, each with a checkbox. The list is organized under a header "Inc?" and a "Description" column. To the right of the list are four buttons: "OK", "Select All", "Deselect All", and "Cancel". Below these buttons is a checkbox labeled "Selected items only".

Inc?	Description
<input type="checkbox"/>	Abbie Home Care Services
<input type="checkbox"/>	About Senior Solutions
<input type="checkbox"/>	AltaMed Health Services
<input type="checkbox"/>	Alzheimer's Association
<input type="checkbox"/>	Antelope Valley Committee on Aging
<input type="checkbox"/>	Armenian Relief Society of Western USA Inc.
<input type="checkbox"/>	Behavioral Health Services, Inc.
<input type="checkbox"/>	Bet Tzedek
<input type="checkbox"/>	Casa Maravilla
<input type="checkbox"/>	Center for Aging Resources
<input type="checkbox"/>	Center for Health Care Rights
<input type="checkbox"/>	City of Alhambra
<input type="checkbox"/>	City of Azusa
<input type="checkbox"/>	City of Burbank
<input type="checkbox"/>	City of Claremont
<input type="checkbox"/>	City of Culver City
<input type="checkbox"/>	City of El Monte
<input type="checkbox"/>	City of Gardena
<input type="checkbox"/>	City of Glendale
<input type="checkbox"/>	City of Inglewood
<input type="checkbox"/>	City of Monrovia

Step Two: Refreshing the Route

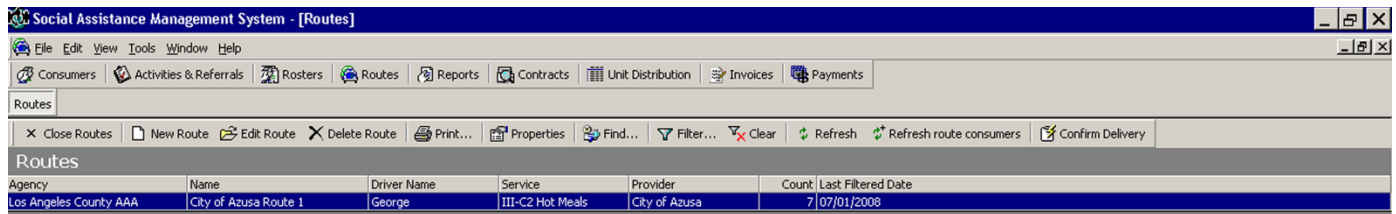
Note: You should complete this step each time before you print a Route.

After you have built your Route Definition in Step One, the next step is to Refresh the Route so that it pulls on all new Consumers.

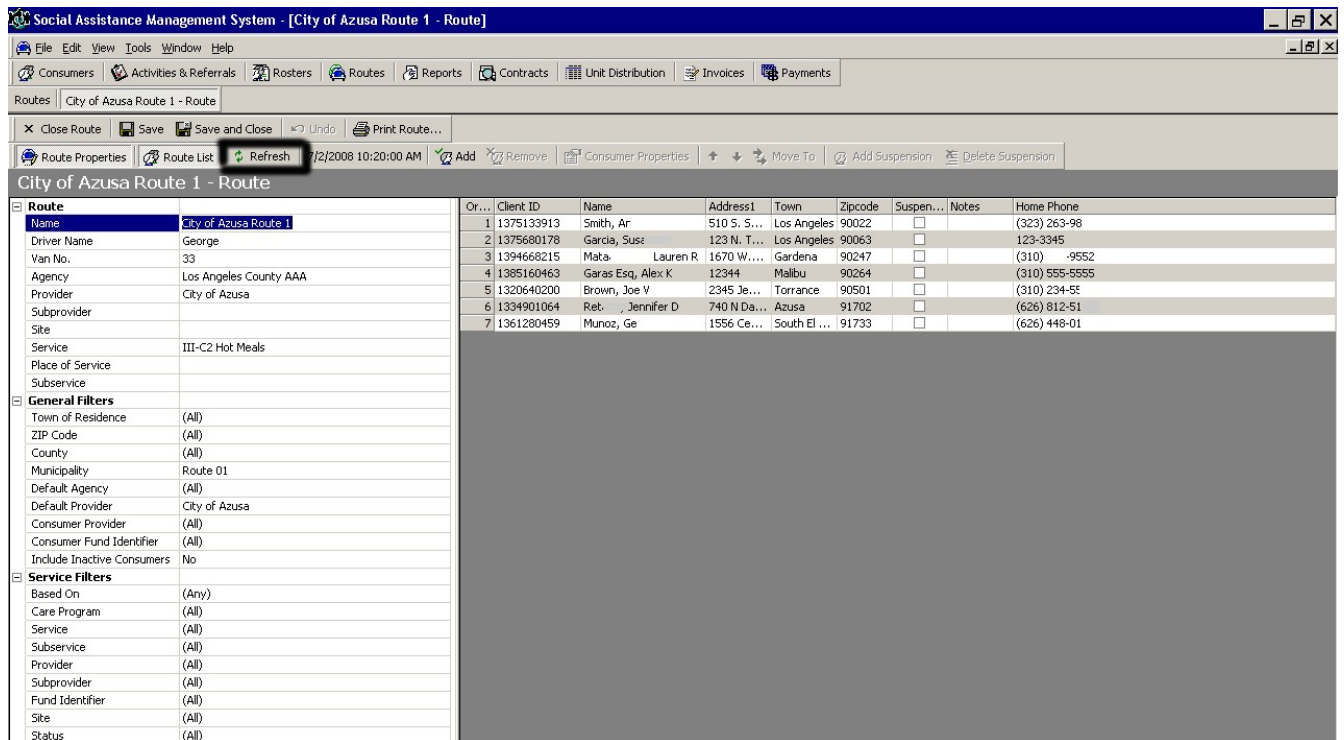
1. In SAMS, Press the **Routes** button.



2. Highlight the Route you wish to refresh and double-click to open it.

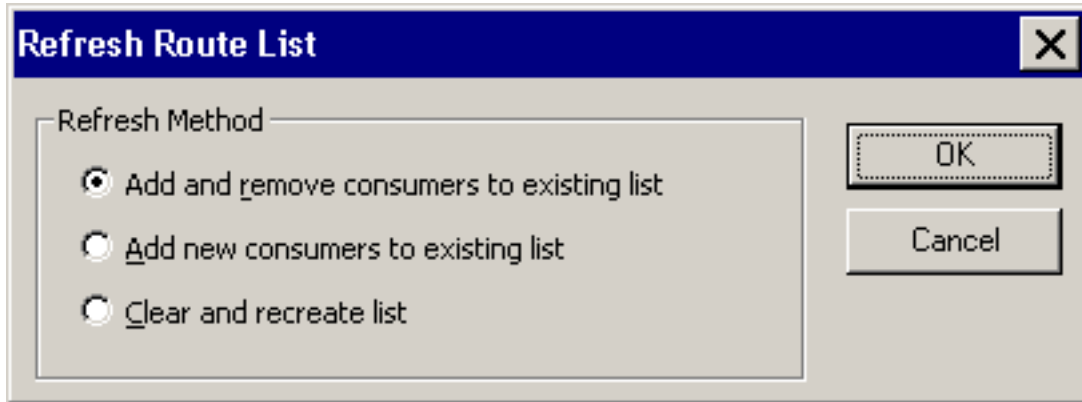


3. Once the Route Filter screen is open, click the **Refresh** button



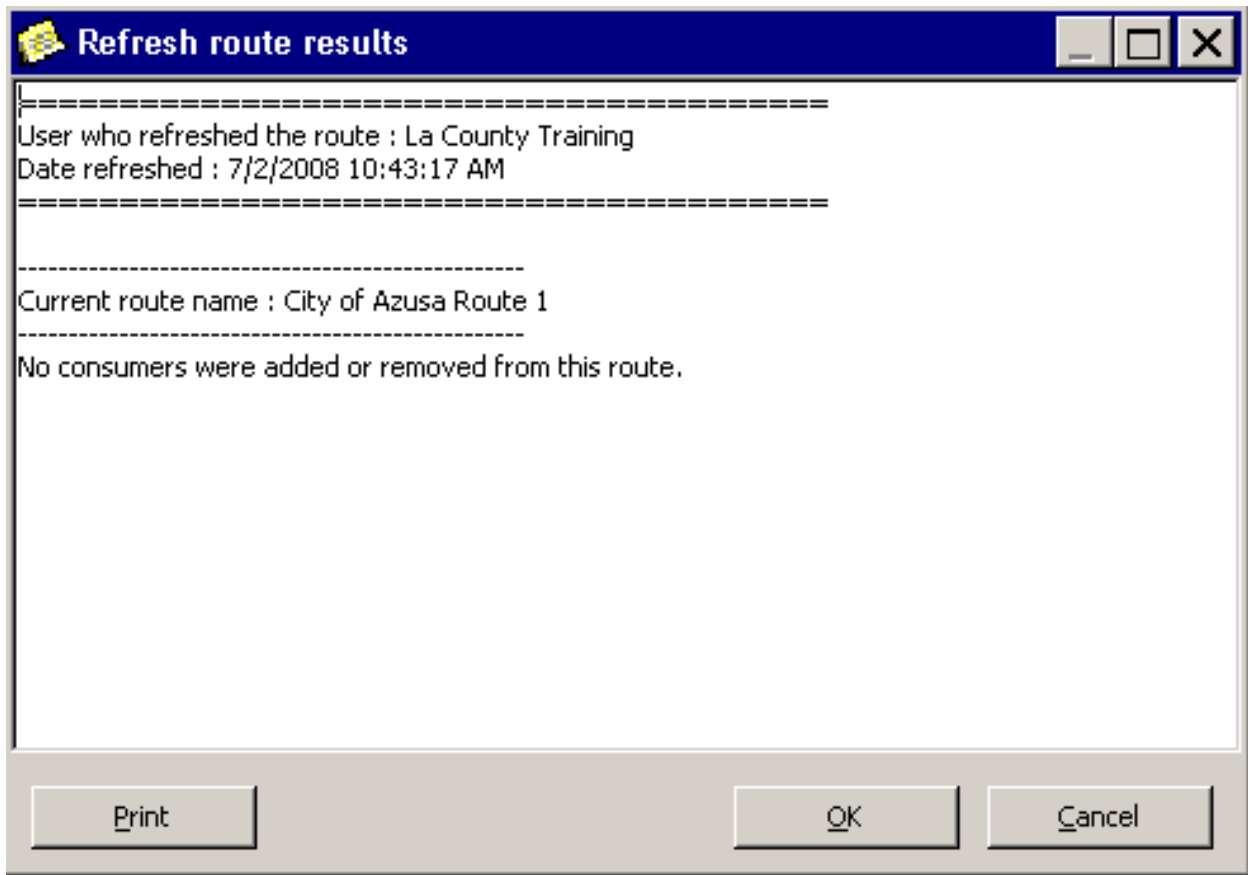
4. In the next window, choose the Refresh Method. The first choice (Add and remove consumers to existing list) is the most common choice to manage Consumers on a Route. This choice will add and remove consumers as they meet the filter criteria that you have set on the Route.

Note: Be very careful here. The **Clear and recreate list** option will clear the list and you will have to reorder all Consumers again.



The "Refresh Route List" dialog box has a title bar with a close button (X). It contains a group box labeled "Refresh Method" with three radio button options: "Add and remove consumers to existing list" (selected), "Add new consumers to existing list", and "Clear and recreate list". To the right of the group box are "OK" and "Cancel" buttons.

5. After you click the "O.K." button, SAMS will display the "Refresh Route Results" window that shows what took place during the Refresh process. You may choose to Print this window, or simply click "O.K." to move past it.



The "Refresh route results" window has a title bar with a help icon, a minimize button, a maximize button, and a close button (X). The main area contains text separated by dashed lines: "User who refreshed the route : La County Training", "Date refreshed : 7/2/2008 10:43:17 AM", "Current route name : City of Azusa Route 1", and "No consumers were added or removed from this route." At the bottom are "Print", "OK", and "Cancel" buttons.

Step Three: Adding, Removing, Moving and Suspending Consumers

Now that the Route has been refreshed, you are ready to *move, add and delete* Consumers as needed.

The refresh step should have added and removed Consumers based on your filters. However, you may manually add and remove Consumers from the Route list as you see fit.

- **Adding Consumers**

Click the “Add” button to add any Consumers that you wish.



- **Removing Consumers**

Click the “Remove” button to add any Consumers that you wish.



- **Moving Consumers**

As you know, in a Home Delivered Meal Route, it is imperative that the Consumers are listed in the order that the Route will be driven.

The Consumer list on the right-hand side of this screen is where you change the order of the Route.

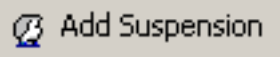
Simply highlight the consumer you wish to move on the list, and use one of the buttons below to move them around until the list is in order.

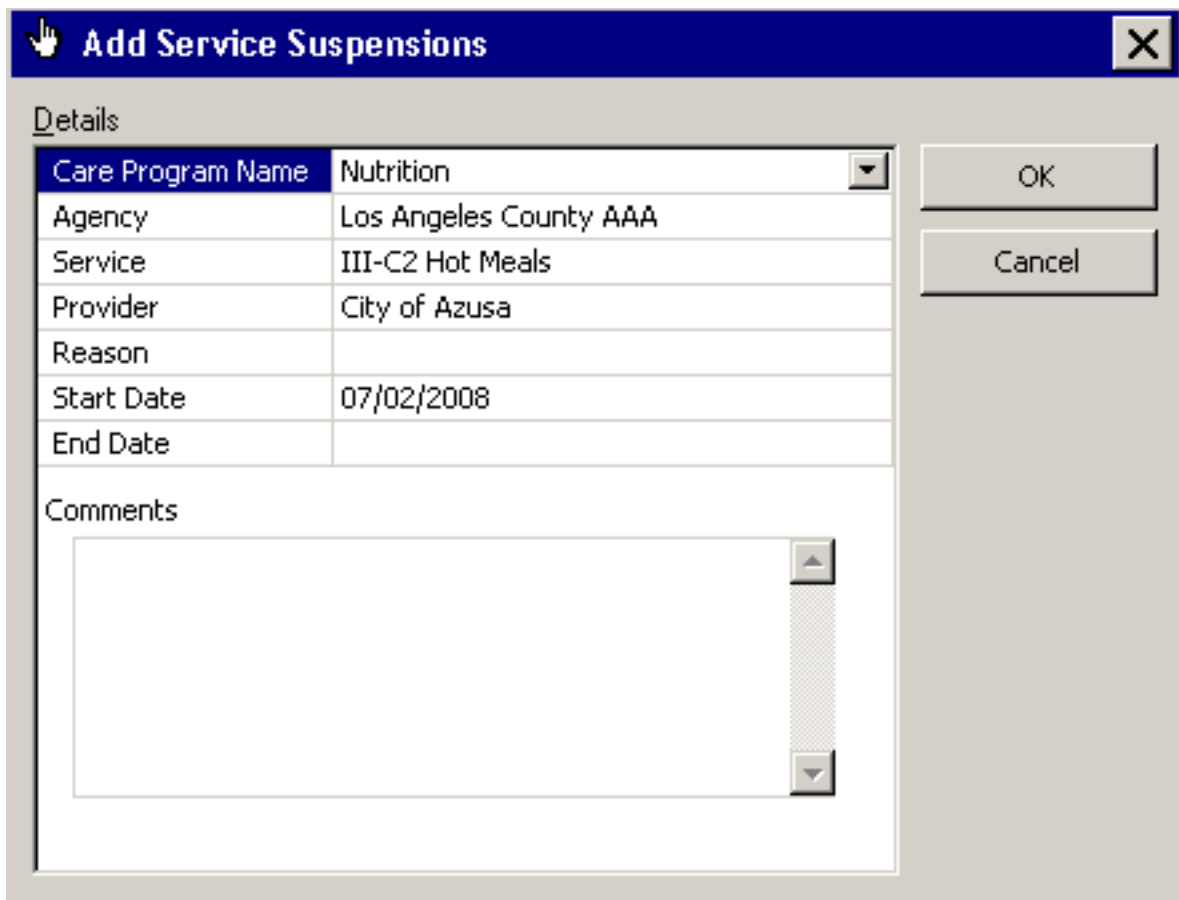


- **Suspending Consumers**

A Consumer may be temporarily suspended from a Route. If you know the Consumer will be away from home, or not receiving a meal for any reason, Suspensions make it easy to manage these situations.

To suspend a Consumer:

- a) Highlight the Consumers name on the Route list.
- b) Click the “Add Suspension” button. 
- c) Fill in the Add Service Suspensions screen. The key fields on this screen are the Reason, the Start date and the End date.



The image shows a software dialog box titled "Add Service Suspensions". It has a blue header bar with a hand icon and a close button (X). Below the header is a "Details" section containing a table with the following fields:

Care Program Name	Nutrition
Agency	Los Angeles County AAA
Service	III-C2 Hot Meals
Provider	City of Azusa
Reason	
Start Date	07/02/2008
End Date	

Below the table is a "Comments" section with a large text area and a vertical scrollbar. To the right of the table are two buttons: "OK" and "Cancel".

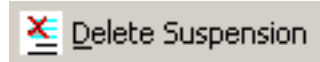
- d) When you are through filling in the information, press the “O.K.” button.

Deleting Suspensions:

Note: You should only delete a Suspension if you made a mistake.

- a) Highlight the Consumers name on the Route list.

- b) Click the "Delete Suspension" button.



Editing Suspensions:

- a) Highlight the Consumers name on the Route list.

- b) Click the "Edit Suspension" button.



- c) Make your edits as needed.

After the Route list appears as you want it to, press the "Save" button in the toolbar.



You are now ready to print the Route.

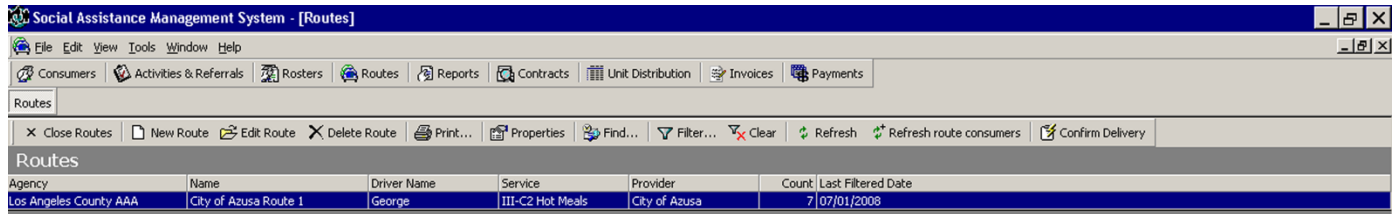
Step Four: Printing the Route

There are many options for printing the Route. We will be covering the most common printing method here: **Compact, Landscape Routes**.

1. In SAMS, Press the **Routes** button.

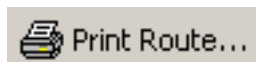


2. Highlight the Route you wish to print and double-click to open it.



3. Verify that the list of Consumers is in order and that everyone you expect to be on the Route is there.

4. Press the *Print Route* button.



5. The screen below shows the order in which the Print Routes screen should be filled out.

The screenshot shows the 'Print Routes' dialog box with two tabs: 'Route Options' and 'Advanced Options'. The 'Route Options' tab is active. It contains several sections:

- Style of Route:** Includes radio buttons for 'Daily Routes', 'Weekly Routes', 'Monday - Friday', 'Full Week', 'Routes (Compact, Landscape)' (selected), 'Daily' (selected), and 'Weekly'. Below these are 'Route Daily Status' and 'Route Mailing Label' (with sub-options 'Name Only' and 'Page Break Between Routes').
- Service Period:** A text box labeled 'Route Date:' containing '07/03/2008'.
- Select to Include in Print Out:** A list of checkboxes: 'Consumer Client ID' (checked), 'Suspended Consumers' (checked), 'Directions' (unchecked), 'Consumer Notes' (checked), 'Driver Notes' (unchecked), 'Consumer Phone Number' (checked), 'Consumer Emergency Contact / Phone' (unchecked), 'Signature Place' (unchecked), and 'Consumer Barcode' (unchecked).

At the bottom are three buttons: 'Preview', 'Print', and 'Cancel'. Annotations A, B, and C point to the 'Style of Route' section, the 'Route Date' field, and the 'Select to Include in Print Out' section, respectively.

- Choose the *Style of Route*. As mentioned previously, Routes (Compact, Landscape) is the most commonly used method. You may also make your choice of *Daily* or *Weekly* Routes here.
 - Choose the *Route Date*.
 - Choose what you would like to include in the Select to Include in Print Out section. You should check the "Directions" box if you have typed directions in the consumer record.
6. Next, you have two choices. You may click the "Preview" button to send the Route to the screen, or you may click the "Print" button to send the Route to the printer.

Troubleshooting Routes

Here are the two most common problems that will hold a Consumer off from a Route:

1. The Consumer has no Municipality designated on the Consumer record.

The Municipality field is located in the Consumer record in the **Details - Residential Address** section, as shown below:

Residential Address	
Street 1	156 Graydonn
Street 2	
County	Los Angeles
Town	Monrovia
State	CA
ZIP Code	91016
Municipality	Route 01
Directions To Home	South to camino real right to graydon right to

2. The Consumer has no Provider designated on the Consumer record.

The Provider field is located in the Consumer record in the **Details - Providers** section, as shown below:

	Is Default	Provider	Start Date	End Date	First Service Date	Last Service Date
 General	<input checked="" type="checkbox"/>	Santa Anita Family Services	06/24/2008			
 Contacts						
 Locations (2)						
 Phones (1)						
 User Fields						
 Ethnic Races						
 Care Enrollments (1)						
 Co-Pay						
 Care Managers						
 Fund Identifiers (1)						
 Providers (1)						
 Caregivers						
 Care Recipients						
 Service Suspensions						